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ABSTRACT

A study examined the situation of the public relations profession in Spain from the point of view of public relations agencies or consultancies, and of individuals in public relations. Forty-four individuals (of a target population of 100) and 26 public relations agencies or firms (of a target population of 40) responded to questionnaires and interviews. Results indicated that: (1) the great majority said that public relations was useful to companies; (2) public relations was understood as mundane activities; (3) interviewees whose companies contain public relations departments considered that the results achieved were good, and that the departments will be strengthened in the future; (4) the level of qualification of the staff was graduates of universities, graduates of higher and lower technical colleges, and graduates of private colleges and public relations schools; (5) most public relations departments were structured as a single, centralized service; and (6) many public relations agencies and consultancies opened between 1985 and 1990. Results also indicated that the main activities undertaken by clients of the interviewees were, in order of importance: meetings and interviews with representatives of international organizations; distribution of sundry material to schools and to scientific organizations and associations; organization of and/or participation in press conferences, symposia, debates, and seminars; opening ceremonies and sports events; opinion polls and analysis; coordination of internal communications; and regular distribution of information to the press. (Six tables of data are included.) (RS)

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ICA Chair's Panel: Public Relations Research and Education An International Perspective

Washington, May 28, 1993

ED 364 918

From Sevilla to Barcelona:

PUBLIC RELATIONS RESEARCH AND EDUCATION IN SPAIN.

THE STRUCTURE OF SPANISH PUBLIC RELATIONS: 1980-1990

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LINES OF RESEARCH FOLLOWED IN ORDER TO MAKE A DETAILED ANALYSIS OF THE ACTIVITY OF THE SUBJECTS OF PUBLIC RELATIONS IN SPAIN.

METODOLOGY

1. The promoting subjects were questioned by means of a standard questionnaire, using the mixed system of personal interview and mailing, in the latter case using telephone follow-up (See "Survey No. 1: Promoting Subjects").

1.1.- Presentation and interpretation of the results obtained from the questionnaire intended for "Promoting Subjects" (44 answered of a sample target of 100).

2. The executing subjects were studied in two phases:

2.1.- Phase No. 1: They were first detected according to their units of production, i.e. a well-known "Public Relations Firm or Agency". In the absence of single reliable lists in our country, after analyzing all the feasible possibilities we decided to use the "analysis of content" of the **Communication Guide** from 1981 to 1989 (in 1990 the section of "Public Relations Consultants" no longer appeared). In 1981 and 1982 the **Communications Guide** was dependent on the Secretariat of State for Information, attached to the President's Office. In 1983 it was transferred to the *Oficina del Portavoz del Gobierno* (Office of the Government Spokesperson), and in 1983 it was dependent on the *Ministerio del Portavoz del Gobierno* (Ministry of the Government Spokesperson). Thus, by drawing up a series of tables we obtained an overall view of the evolution of the executing subjects of public relations in Spain from the point of view of business units. We obtained annual figures (1981-89) for; name and changes of name, new firms and closures, distribution by cities, and differential increases and decreases (See Tables 1 to 6).

This research was based on the following parameters and codifying elements:

a) The data used in this research were collected from the nine editions of the **Communication Guide** which cover the period from 1981 to 1989.

b) The name of the public relations consultancies or agencies which appear in Table 1 is the same as the current one in the last year covered by the research, i.e. the name which appears in the 1989 **Communication Guide**. In the case of closures (of the executing subject of public relations) the last name registered has been maintained.

c) A change of name is understood as any variation in the name, of whatever importance, including the corresponding initials if applicable.

d) The only requisits for a public relations agency, firm o consultancy to appear in the **Communication Guide** was a simple letter addressed to the editors. It was therefore impossible to consider other details of interest , such a for example the type of legal structure in which they have operated in the context of the public relations industry.

e) Whenever there was a change in the name of the public relations consultancy in question, it was codified by a number in parenthesis. For example, if a public relations consultancy operating for three years had changed its name three times -logically once a year-, this would be shown in the corresponding box of the table as follows; 3 (3).

To give an example, the public relations consultancy which has chang its name most times is Number 57, IMAGEN PUBLICA, S.A. (INTERGRUP). It is shown as follows:

1st year of registration 1981: 1.
7th year of registration, with changes in 1983, 1984,
1985, 1986 and 1987: 7 (5).

f) The executing subjects were also interviewed by means of a standard questionnaire. In the same way a personal interview was held, or the questionnaire was sent by post with a telephone follow-up (See "Survey No. 2: Executing Subjects/Public Relations Agencies or Firms).

2.2.- Phase No. 2:(See "Survey No. 2: Executing Subjects/Public Relations Agencies o Firms). Presentation and interpretation of the results obtained from the questionnaire intended for "Executing Subjects" (26 answered of a sample target of 40).

SUMMARY OF THE CONCLUSIONS OF THE RESEARCH CARRIED OUT ON THE PROMOTING AND EXECUTING SUBJECTS OF PUBLIC RELATIONS.

A) ON THE PROMOTING SUBJECTS.

In summary we picked out the following overall conclusions from the tables (attached below) to show the situation of the public relations profession from the point of view of the promoting subjects.

From the replies we can see that the interviewees consider what the qualitative level of public relations is positive, but almost a third say that it is "mediocre".

The great majority say that public relations are useful to companies, 40.91% say that they are more useful in the field of marketing and advertising, and 54.55% in the field of personnel. And if we establish the ratio, which we will call "proportion", with the percentages corresponding to the "most and least important", we obtain the following proportions. For marketing we obtain a ratio of 0.5 to 1 (in favor of marketing). For advertising the ratio obtained is 0.83 to 1 (in favour of advertising) and in personnel relations 0.20 to 1 (in favour of personnel relations). From this we can see that greater importance is given to marketing, advertising and personnel relations then to public relations itself.

Public relations is understood as mundane activities visits to the different installations of the company, producing films on different areas of the company, relations with other companies in the sector, direct relations with the Public Administration and socio-cultural activities of promotion.

The replies show that public relations has an implantation of 90.91% in its potential market.

The interviewees whose companies contain public relations departments consider that the results achieved are good, even optimum, and most interviewees therefore think that these departments will be strengthened in the future.

Most avoided replying on the public relations budgets of companies. But from the few replies received we can see that in general the public relations budgets are far lower than the advertising budgets. It can even be seen that when advertising and public relations are financed by the same budget -even if it is divided equally- the proportion corresponding to public relations is lower than the proportion that would correspond to it if it had its own budget. The assignation of human resources to PR is normally shared with the activities of advertising and marketing, etc.

The level of qualification of this staff is, in order of importance: graduates of universities, graduates of higher and lower technical colleges, and graduates of private colleges and PR schools (the last two in fourth place). As for their experience, they come, in order of importance, from the fields of marketing, commerce, journalism, training or education, or are self-taught.

As for the specific duties of the person in charge of the public relations department, the six most common, in order of importance, are: controlling the publications department, control of the advertising, coordination of communications policy, study and implementation of global programmes and /or public relations specific programme, control of the company image and distribution of information.

The six mots frequent activities carried ou in the companies surveyed are, in order of importance: visits and meetings with representatives of international organizations, distribution of information to the television, press and radio, production of audiovisual material and publication of the annual report and company publications.

It is important to note that the companies that publish an annual report do so primarly with the shareholders of the company in mind. Far less attention is paid to the company employees and the public in general.

Most of those in charge of public relations are responsible to the general management, although some come under the marketing department. Most public relations departments say that they carry out duties of a mixed nature, i.e. consultancy and implementation, although a small minority say that they only deal with consultancy and advice, particularly if the departments are situated in the companies at a standard level or at the level of general management. The same proportion say that they are responsible to a head of division or a head of operations.

Most public relations departments are structured as a single, centralized service, though a minority consist of a central body and different branches. Most of the latter are regional branches. The public relations department have a clearly executive nature, and those working as consultants or advisors are a minority.

When asked whether a decision made by the top executives of the company could lead to opposing impressions in the different types of public (workers, shareholders, etc.) a ratio of 2.59 to 1 interviewees replied affirmatively.

The vast majority of interviewees say that public relations in the company is considered on the same level as marketing, advertising and personnel relations. They also thought, in order of importance, that public relations should be considered as of equal importance to advertising; that it should supervise the communications policy of the company; and lastly, an almost statitiscally irrelevant percentage say that public relations should be included within advertising as a secondary or subordinate activity.

B) ON THE EXECUTING SUBJECTS (PHASE No. 1).

Table 1 (a)(b):

The list of public relations consultancies in Spain for the period 1981-89

Table 2

Diagram divided into years and cities in which public relations consultancies have been opened

Table 3

Consultancies opened per year

Table 4

Consultancies opened and yearly increase

Table 5

Consultancies that have changed name

Table 6

Consultancies that have closed per year

THE LIST OF PUBLIC RELATION CONSULTANCIES IN SPAIN

TABLE 1 (a).

FOR THE PERIOD 1981-1989

	1981	1982	1983	1984	1985	1986	1987	1988	1989
1.- A-Z								1	2
2.- ACH ASOCIADOS, S.A.					1	2	3	4	5
3.- ADAS					1	2	3	4	5
4.- AGENCIA MADISON INTERNACIONAL									1
5.- ANA ARAMBARRI Y ASOCIADOS								1	2
6.- ANICOM, S.L.									1
7.- ARTIME, NEBOT-CAPELL, S.A. *						1	2(1)	3	
8.- ASOCIADOS MUNDOVISION CONSULTORES DE CAMPANAS POLITICAS					1	2(1)			
9.- ASPID. ASESORES PARA INDUSTRIAS DE PRENSA.							1	2	
10.- ATENAS. GAB. DE PRENSA, PUBLICIDAD Y RR.PP.					1	2	3(1)	4	5
11.- ATKINSON Y ASOCIADOS							1	2	3
12.- BASE									1
13.- BERNABEU ASOCIADOS, S.A.							1	2	3(1)
14.- BRENNAN ASOCIADOS.					1	2	3	4	5
15.- BUFETE INTERNACIONAL DE COMUNICACION E IMAGEN.								1	
16.- BURSON-MASTELER					1	2	3	4	5
17.- CAIDOSA. CONSEJEROS ASOC. DE INFORM. Y DOCUMENTACION, S.A.							1	2	3
18.- CANARY CONSULTING GROUP.				1	2(1)	3	4	5	6
19.- CANONGIA-ITEY.									1
20.- CARLOS PANIAGUA COMUNICACION, IMAGEN Y RR.PP.									1
21.- CARLOS ZOSTHER COMUNICACION Y DOCUMENTOS, S.A.									1
22.- CEDES, S.L.									1
23.- CENTRE D'IMATGE I COMUNICACIO.								1	2
24.- CIMA. ASESORIA DE IMAGEN Y COMUNICACION, S.A.									1
25.- C.I.V.A. RELACIONES PUBLICAS									1
26.- COMPANIA, LA.									1
27.- COMPANIA ESPANOLA DE RR.PP. Y MARKETING, S.A. (R.P.M.)*	1	2(1)							
28.- COMUNICACION Y RELACIONES PUBLICAS, S.A.				1	2	3			
29.- CONSEJEROS DE IMAGEN VALENCIANA S.A.L. (C.I.V.A.)								1	
30.- CONSULTORES DE COMUNICACION, S.A.					1	2	3	4	5
31.- CONSULTORES TECNICOS DE COMUNICACION SOCIAL T C S 40.							1	2	3
32.- DI-CO.						1	2	3	4
33.- DIEGO SEGURA Y ASOCIADOS,S.A.								1	
34.- DRP ASOCIADOS.									1
35.- EDITORIAL CONSULTING.				1					
36.- EIDOS, CONSULTORES EN COMUNICACION Y RR.PP.	1	2	3	4					
37.- EIKONA COMUNICACION.									1
38.- EQUIPO-L CONSULTORES ASOCIADOS, S.A.					1				
39.- ERRE-DOS, S.A.								1	2
40.- E.S.O.C., S.L.									1
41.- ESTUDIO GENERAL DE MEDIOS, S.A.							1	2	3
42.- ESTUDIO RAFAEL TORRES PADIAL (GABINETE COMUNICACION).*				1	2	3	4	5	6(1)
43.- EUSKADI 2000.								1	
44.- FEEDBACK, IMAGEN Y COMUNICACION, S.A.						1	2	3	4
45.- FIRST LINE PRESS, S.A.									1
46.- FLASH, CONSULTORES DE RELACIONES PUBLICAS, S.A.	1								
47- GABINETE URIBE, S.A.					1	2(1)	3(2)	4	5
48.- GABINORTE, S.A.			1	2	3	4	5	6	7
49.- GAUR. COMUNICACION E IMAGEN.						1	2		
50.- GENE Y ASOCIADOS, IMAGEN, COMUNICACION Y RR.PP.				1	2	3	4	5	6
51.- GRUPO MARCO.								1	2
52.- IBC (INTERNACIONAL BUSSINESS CONSULTANTS).								1	2
53.- IBERICA DE CONGRESOS.		1							
54.- ICSA-COMUNICACION.	1	2	3	4	5	6	7	8	9
55.- IMAGEN DE EMPRESA.						1			
56.- IMAGEN Y EMPRESA, CONSULTORES (IECO).							1	2	3
57.- IMAGEN PUBLICA, S.A. (INTERGRUP).	1	1	3(1)	4(2)	5(3)	6(4)	7(5)	8	
58.- IMAGEN UNO, S.A.				1	2	3	4	5	6
59.- INFORMACION E IMAGEN / ANALISIS DE MEDIOS.								1	2

THE LIST OF PUBLIC RELATION CONSULTANCIES IN SPAIN

TABLE 1 (b).

FOR THE PERIOD 1981-1989

	1981	1982	1983	1984	1985	1986	1987	1988	1989
60.- INFORMACION, IMAGEN Y COMUNICACION GLOBAL (I.C.G. 2025, S.A.)									1
61.- INFORMACION PERSONALIZADA: ANALISIS Y DOCUMENTACIONES, S.A. (IPAD).							1	2	3(1)
62.- INTER-CONGRES.					1	2	3	4	5
63.- JAVIER GATABALLE Y ASOCIADOS.									1
64.- J.C.R. JUAN CASTELLO ROVIRA.									1
65.- J.R. GABINETE TECNICO DE RELACIONES PUBLICAS E IMAGEN CEREMONIAL Y PROTOCOLO					1	2	3	4	5
66.- JOSE F:CERVERA.								1	2
67.- LINAS (Sociedade Cooperativa Limitada Galega de Comunicación e Imaxe)*						1	2(1)		
68.- LINK, S.A.	1	2	3	4	5				
69.- LOPEZ-SCHMID, GABINETE DE RELACIONES PUBLICAS.									1
70.- LOZANO-MUNIESA Y ASOCIADOS, S.A.								1	2
71.- MK-3, S.A.								1	2
72.- M/TRES, GABINETE DE LA COMUNICACION.							1	2	3
73.- MASS MEDIA CONSULTORES DE COMUNICACION, S.A.									1
74.- MEDIATIQUE, S.A.									1
75.- MOLINER GREAGH GRUPO CONSULTOR.						1	2	3	4
76.- MOS-3 PROMOCION.								1	2
77.- NINBUS									1
78.- NOTORIUS, S.A.									1
79.- NUEVA PRENSA.					1	2	3	4	5
80.- O.P. CONSULTORES.									1
81.- PACO-COMPANIA.									
82.- PANORAMA, EQUIPO DE COMUNICACION, S.A.					1	2	3	4(1)	5
83.- PERFORMANCE, S.A.									1
84.- PORTABELLA Y ASOCIADOS COMUNICACION Y RR.PP.			1	2					
85.- PRAT-DOMENECH.									1
86.- PROTOCOLO 14, S.A.									1
87.- PUNCHI, S.A.						1			
88.- RADIOTEPRESS, ACCIONES Y PROMOCIONES, S.A.							1	2	3
89.- RHEA CONSULTORES, S.A.							1	2	3
90.- RIZZI, POLK-PARTNERS, LTDA.								1	2
91.- ROSALINA LASSO DE LA VEGA. GESTION DE MEDIOS.									1
92.- S.A.E. DE RELACIONES PUBLICAS (R.P.)	1	2	3(1)	4	5	6(2)	7(3)	8	9
93.- S.A. TECNICAS DE COMUNICACION PROMOCIONAL.			1	2	3				
94.- SCOPE, S.A.	1	2	3	4	(5)	6(1)	7	8	9
95.- SCR. RELACIONES PUBLICAS, S.A.									1
96.- SERFO INTERNACIONAL Y ASOCIADOS.						1	2	3	4
97.- SERVIGESA.				1	2	3	4	5	6
98.- S.G.C.C. S.G. DE CONSULTORES DE COMUNICACION.						1	2	3	4
99.- SIRP. RELACIONES PUBLICAS.							1		
100.- SUAREZ ALBA. CONSULTORES DE COMUNICACION E IMAGEN.								1	2(1)
101.- SYMBOLO, CEREMONIAL Y PROTOCOLO S.L.								1	2
102.- TAFE. GABINETE TECNICO DE RELACIONES PUBLICAS Y PUBLICIDAD.			1	2	3(1)	4	5	6	7
103.- TECNICAS DE COMUNICACION E IMAGEN.							1		
104.- TECOP, TECNICOS EUROPEOS EN COMUNICACION Y PUBLICIDAD, SA.				1	2	3(1)	4	5	6
105.- TERP/HILL-KNOWLTON ESPANA, S.A.		1	2	3	4(1)	5	6	7	8
106- ULLED-ASOCIADOS, CONSEJEROS DE RELACIONES PUBLICAS, S.A.	1	2	3	4	5(1)	6(2)	7	8	9
107.- URZAIZ-URZAIZ, ASOCIADOS, RELACIONES PUBLICAS				1	2	3	4(1)	5(2)	6(3)
INTERNACIONALES, S.A.									
EUROPUBLIC,S .A.									
PUBLIMULTI, S.A.									
R.P.I. GALICIA, S.A.									
R.P.I. CANARIAS, S.A.									
108.- VIPS, SERVICIOS AUXILIARES,S .A.									1
109.- WARD WALLACE-ASOCIADOS.								1	2
110.- YRAOLA-VEGA ASOCIADOS, S.A.							1	2	3

TABLE 2

10

DIAGRAM DIVIDED INTO YEARS AND CITIES IN WHICH PUBLIC RELATION CONSULTANCIES HAVE BEEN OPENED.

CITIES	1981	1982	1983	1984	1985	1986	1987	1988	1989
ALICANTE									2
BARCELONA	2	2	3	5	9	1	1	14	22
BILBAO			1	2	2	2	1	1	3
GIRONA								1	2
MADRID	7	8	7	12	15	17	25	36	39
MURCIA									1
OVIEDO				1	1	2	2	3	3
PALMA MALLORCA							1		1
LAS PALMAS GRAN CANARIA				1	1	1	1	1	1
SAN SEBASTIAN								1	
SANTANDER			1	1	1	1	1	1	1
SANTIAGO COMPOSTELA						1	1		
SEVILLA					2	2	3	3	4
VALENCIA								1	3
VITORIA						1	1	1	1
VIZCAYA									1
ZARAGOZA						1	1	1	1
TOTAL	9	10	12	22	31	39	48	64	85

YEARLY 1 2 10 9 8 9 16 21

13 IN SEVEN YEARS (1983-1989)..... 73

14

TABLE 3

CONSULTANCIES OPENED PER YEAR

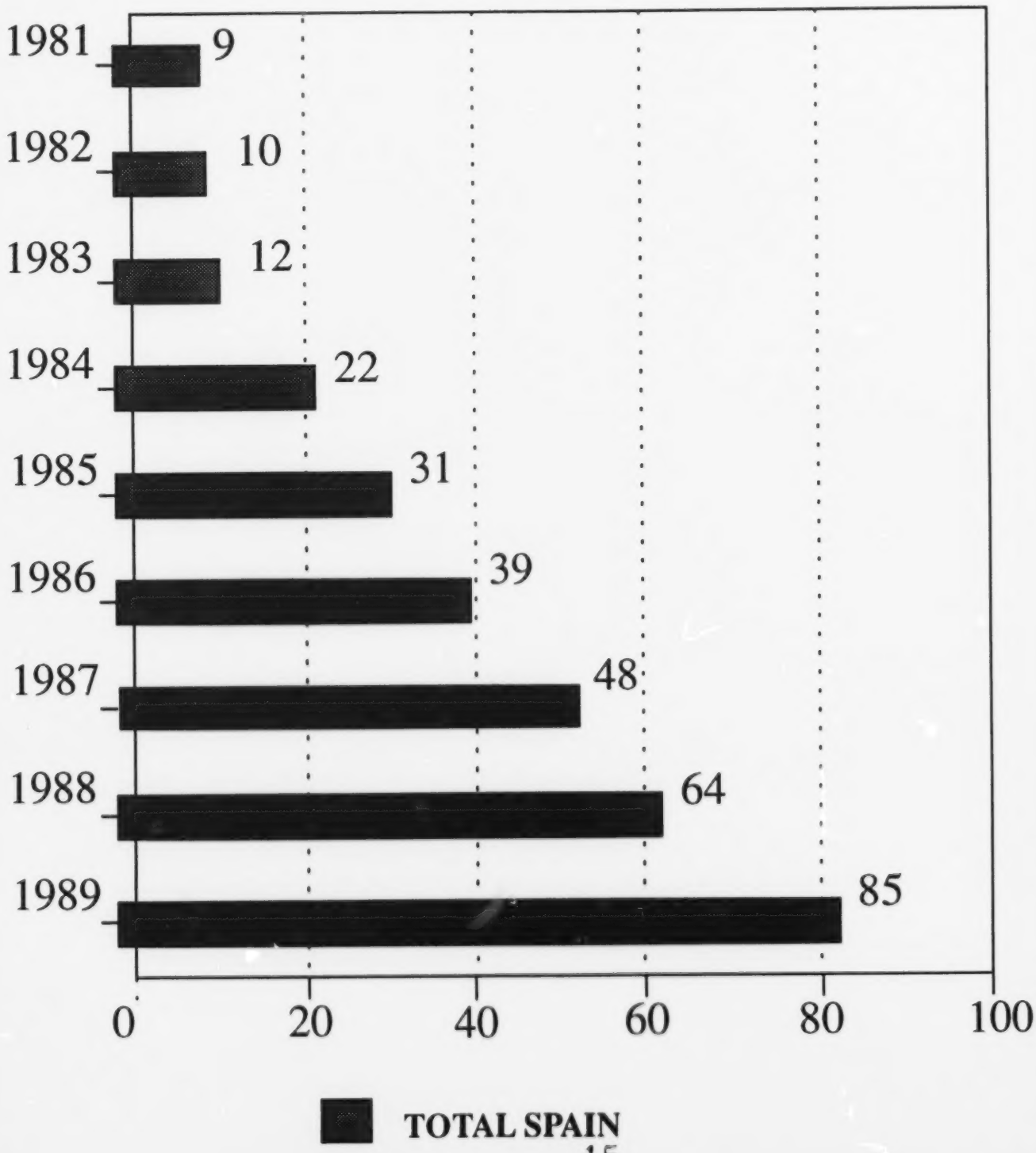


TABLE 4

CONSULTANCIES OPENED AND YEARLY INCREASE

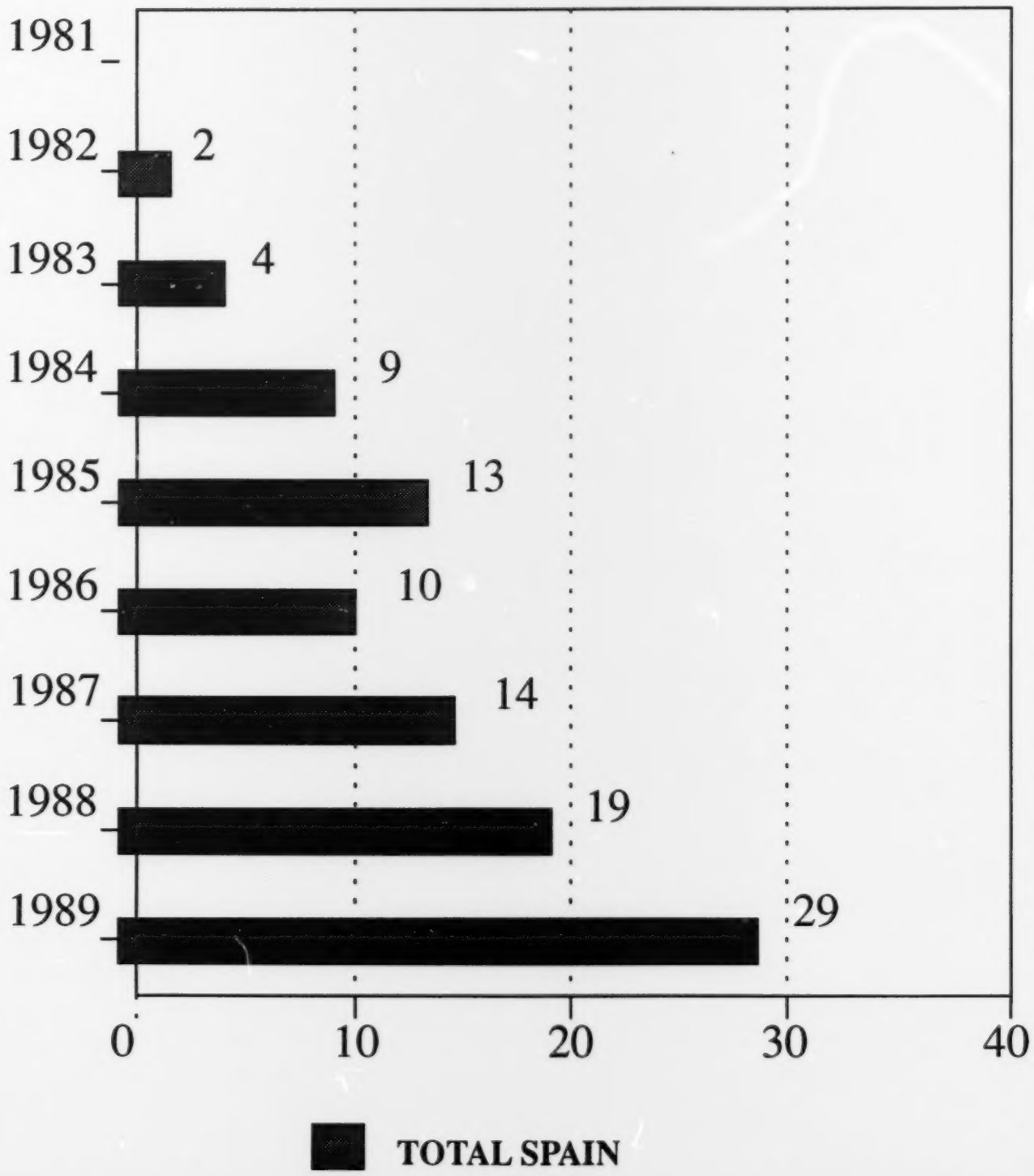


TABLE 5

CONSULTANCIES THAT HAVE BEEN CHANGED NAME

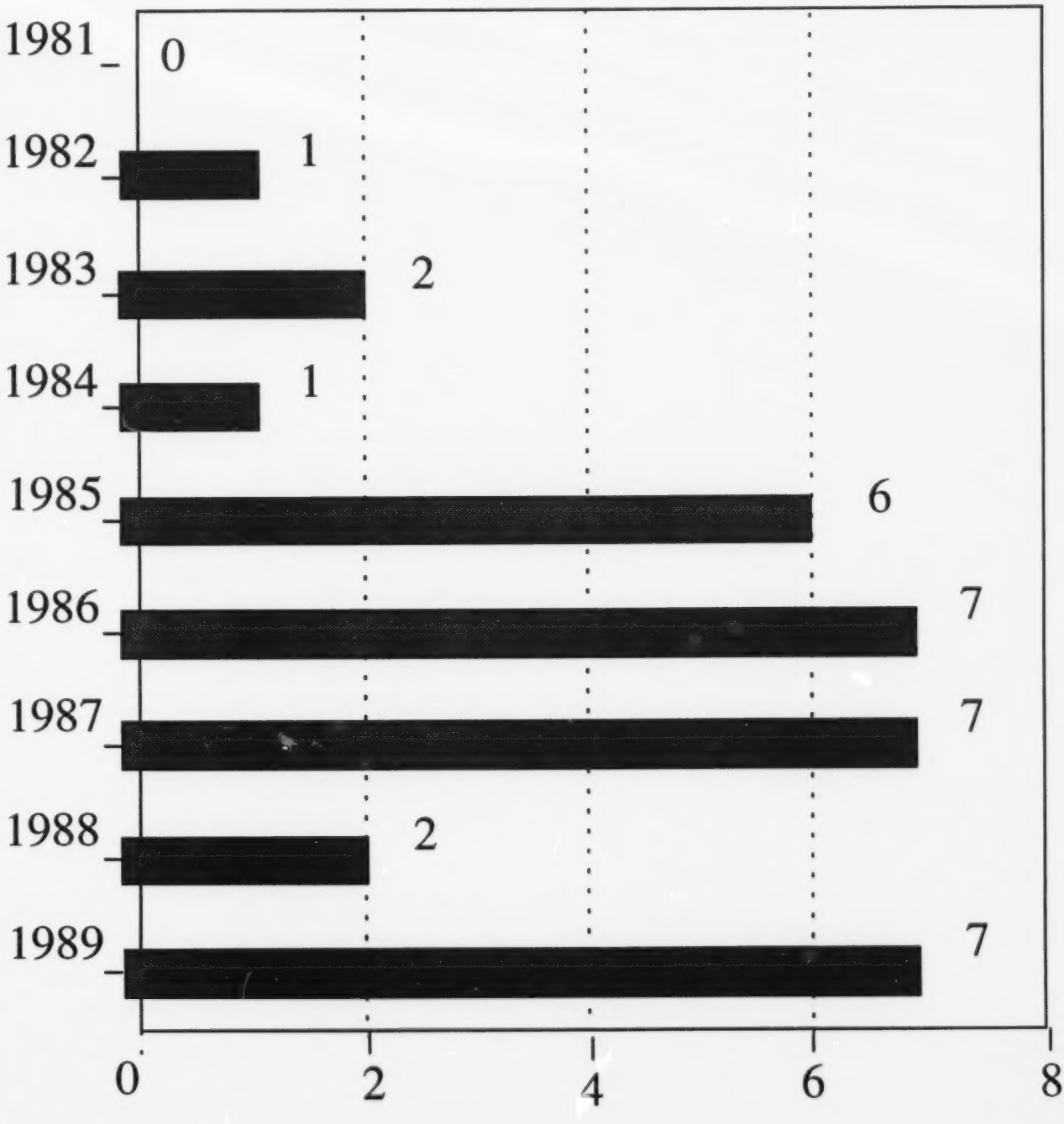
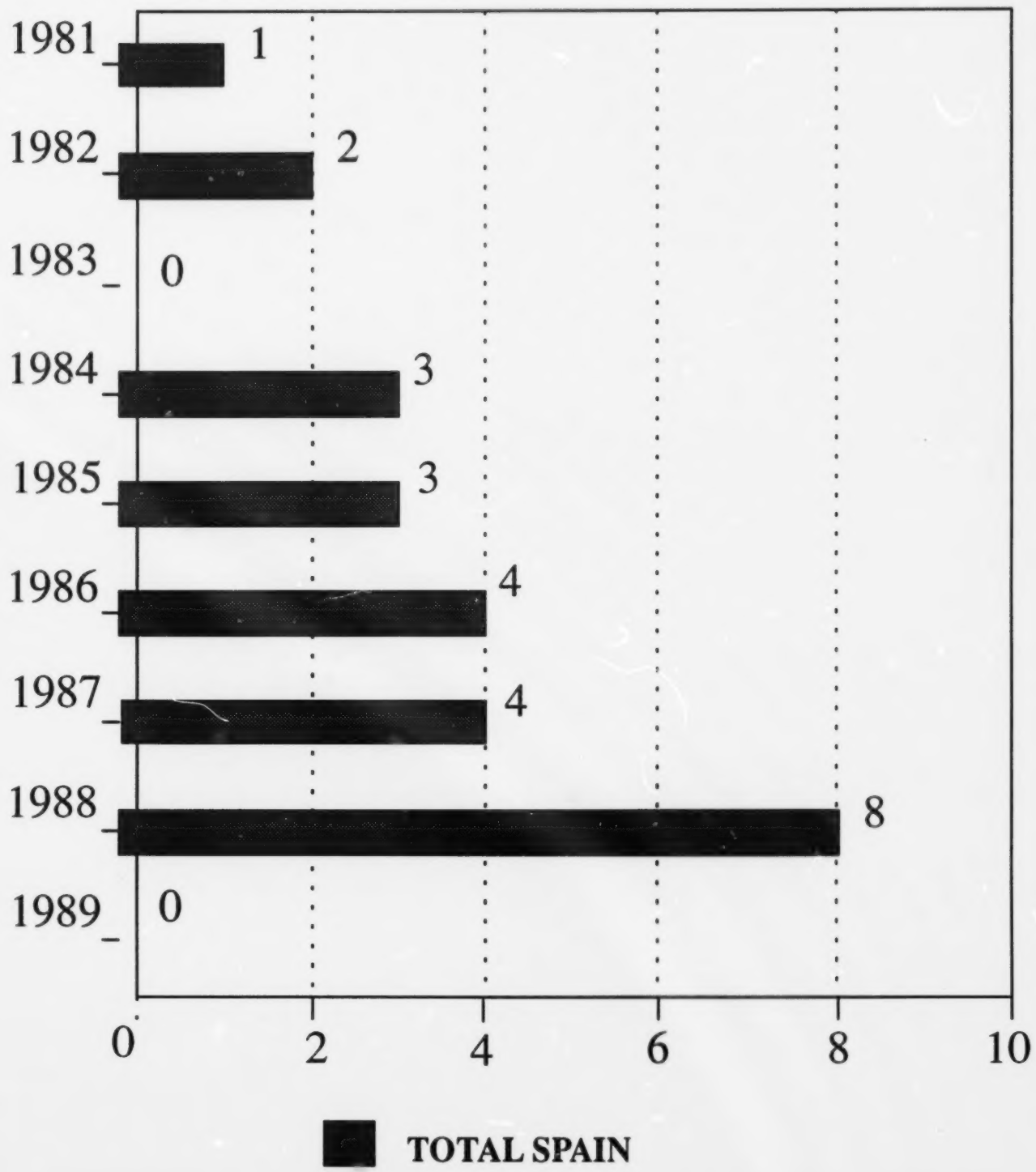


TABLE 6

CONSULTANCIES THAT HAVE BEEN CLOSED PER YEAR



B) ON THE EXECUTING SUBJECTS (PHASE No. 2).

From the replies obtained it was possible to draw up a synthetic outline of the situation of public relations at a general qualitative level from the viewpoint of the executing subjects. The current tendency is positive, not only from the qualitative point of view, but also in the increase in the number of activities and executing subjects in the last five years.

The most common public relations activities are: editing press releases, organizing opening ceremonies and visits, editing leaflets, socio-cultural events, activities, general events, and in particular sports events. Also included are company magazines with internal information, and the making of documentaries.

With regard to the effectiveness of the different activities carried out in Spain, the interviewees replied in this order: education campaigns, sports, cultural and social events.

The promoting subjects who commission most public relations campaigns and activities are, in this order; public companies, other organizations and private companies. In no case was the Public Administration mentioned.

When questioned on the age of the different agencies and consultancies, a high percentage of interviewees replied in others, which shows that many public relations agencies and consultancies in Spain have opened in the last five years. This corroborates the study of content made from the **Communications Guide**, 19.05% of replies placed the creation of the greatest number of agencies and/or consultancies in 1970 and 1980, 14.29% placed it in 1985, and 4.76 placed it in 1960 and 1965. This would seem to indicate that the nineteen-sixties marked the beguinning of a "dynamic consumer market" for public relations services, which led to the setting up of the first public relations agencies as a direct response to the "market demand for services". This reached its height at the beginning of the eighties, and tender to level out after 1985.

The survey showed a wide difference in the number of employees working in the different agencies or consultancies. Staff numbers ranged from a maximum of 90 permanent employees to a minimum of 1, giving an average of $x = 13$. For casual employees there was a maximum of 20 and a minimum of 0, giving an average of $x = 7$.

The qualifications of this workforce were in order of importance; university degrees, degrees from higher technical colleges, degrees from lower technical colleges and degrees from public relations schools (both with the same percentage), and lastly degrees from private schools.
It is interesting to note that only 11.12% (in third place) have specific training in public relations. The employees of the public relations agencies therefore come mainly from the field of public relations, journalism, advertising, marketing and press office, and in general have technical experience.

Only 61.90 of clients of the agencies and consultancies include a public relations unit in their administrative chart.

On who commissions the public relations services of the agency or consultancy, and what post he holds, the replies showed that they are primarily commissioned by the general manager, followed by the marketing manager and then the commercial manager.

The expectations for the future of public relations are clearly favourable, since all interviewees without exception replied that there is a tendency towards growth.

The contracts are primarily entered into on an annual basis, secondly for specific activities, and lastly for campaigns.

The main activities undertaken by the clients of the interviewees are, in order of importance: meetings and interviews with representatives of international organization, distribution of sundry material to schools and to scientific organizations and associations, organization of and/or participation in press conferences, symposia, debates, seminars, etc., opening ceremonies and sports events, opinion polls and analysis, coordination of internal communications, and regular distribution of information to the press.

The public relations activities that the interviewees have recommended in the last five years are, in order of importance: press conferences, information campaigns, press releases and house organs (the latter in the third place); openings, meetings with international organizations, scholarsips, grants, meetings or activities with the Public Administration and distribution of information (the last three in joint sixth position).

The criticism of public relations by advertising experts are: firtsly, that they are confused; that there is a lack of competent professionals and they are less effective than advertising (joint second); thirdly, that they are not controllable; fourthly, that there is a lack of rigour; and fifth and last, that they are excessively costly.

The suggestions for improving the compelementariness of advertising and public relations are: firstly, that they should be separated, secondly that the different duties and activities of public relations should be better explained, and thirdly that the promoting subjects should be educated in the activities of the industry of persuasion, and that professional associations should be set up.

The clients of the public relations agencies and/or consultancies are, in order of importance: Public Companies, other organizations and private companies.

There is a great divergence in the staffing levels of the public relations agencies and consultancies, since there was a maximum of 55 full time employees and a minimum of 0, giving an average of 9. For part time workers the maximum figure was 10, and the minimum 0, giving an average of 3. A high number of interviewees failed to reply on the gross turnover figures provided by the interviewees for the years 1985 to 1989 inclusive. The figure obtained can therefore only be regarded as indicative, but it shows a tendency to growth in gros turnover.

However, 3.99 interviewees to 1 (57.14% to 14.29%) think that the gross figure of growth for the public relations industry is 20%.